



How to Select Help Desk Software

The day has arrived for you to begin looking into purchasing a Help Desk Software Package. So you start by going to Google and search on "Help Desk Software". Now you can begin sorting through the 30 million results.

This paper will give you a hand sifting through the hundreds of providers of Help Desk software by providing some common issues that come up in the search and point out some areas where knowing your own processes can help you select the best vendor.

Budget Considerations

There are a broad range of prices available from different vendors ranging from the free to the very expensive. Get an idea of what your company can afford. If your budget truly is \$0, your search should begin with free products. If you have even the smallest budget, concentrate on what your money can purchase and compare it to the needs of your company.

Architecture

In the world of Help Desk software, there are three basic architectural models that software vendors use to run their software. Each can have advantages and disadvantages to you. Understanding the architecture is an important step in your purchase decision.

Hosted or Cloud Based

In this case you do not own the software, but you are leasing or renting the software from a vendor and they are providing you access to it through a web site. The advantage is that all management of the servers is done for you and all equipment expenses are incurred by the software vendor. The disadvantage is that you do not own the software, and do not have direct access to the software or your data. In some cases the data you entered is not even yours anymore.

Installed on your servers

You install the software on your own servers and will manage the server, data and the website. The advantage is that you own your data, in many cases the software, and you can access the

data directly in case you need to update or change data directly in the tables. The disadvantage is that you must maintain the servers and the operational software.

Lease

Some companies provide monthly or yearly leases to use the software for the term of the lease. The software may be either hosted by the vendor or installed on your servers. While less expensive to get started, it may provide to be a more expensive option as years pass. Make sure you understand where the break-even point is on either hosted or installed options and see if you get credit for any dollars invested if you go from lease to own.

If you decide to go for the owned solution or the leased solutions be sure to check to see if the database (such as SQL) is included in the software package or if it needs to be a separate purchase. Find this out early in the discovery period so you can see how these dollars may affect your budget.

Client/Server vs Web Based

In the past, it used to be common to have Help Desk software that required an application to be installed on each PC before the system could be accessed and operated. These Client Side applications would then update the server with any appropriate information. Client/Server installation provides an excellent way to provide the ability for your users to input their information and tends to be very secure and fast, however it has a heavy price to pay on the administration side. The application must be deployed to the users and supported like any other application on the network.

Because of the heavy drain on resources to administer this type of system, many Help Desk software providers have developed Web-based applications.

Web-based applications need only an internet browser and a URL to operate. Nothing needs to be installed on the Client Side machines. You can operate the software using SSL to provide secure communications to the server. Web based packages are not limited to any particular computer, but can be accessed by any device that can access the web. People on the go can use their netbooks, laptops or even mobile phones to enter and respond to Help Desk tickets.

How can you tell the difference between Client/Server and Web-Based in a demo?

If you are required to load code on your desktop to begin the demo, you are not dealing with a vendor that offers a web-based solution. True web-based systems need only a URL to show a demo.

If a vendor sends you a file to demo their solution, you are not seeing a 100% web-based solution. The file either loads a client/server system on your desktop or is a complete “canned” demo.

Make sure to evaluate and demo the software you’re looking at purchasing. When choosing between client/server and web-based, make sure the functionality is comparable.

Pricing, Terms & Conditions and Hosting

When obtaining solution pricing information, the key is to get a detailed quote. Vendors seeking to entice prospects with low costs may only provide summary quotes. These summary quotes may not include features that are not a part of the core solution (add-on modules), but may be required by you for your specific help desk needs.

For example, a vendor may tell you that their solution supports Active Directory (AD) integration, but when you receive a summary quote, it may only reflect the price of the core solution. You may later find out, after purchasing the solution, that AD is one of their add-on modules. You will then need to purchase this add-on functionality, driving your support solution price up much higher than you anticipated.

When requesting a price quote:

- Specifically point out what you require, and make sure that what you saw in the demo is what will be quoted.
- Ask for a price sheet that lists the vendors' full range of solutions and add-on modules, so as your needs change you will not suffer from sticker-shock when it comes time to add more functionality/features.

Solutions that offer "standard," "professional," and "enterprise" versions can be very confusing and it is difficult to tell what features you are getting. Many vendors offer multiple versions but only have a single demo: How do you know exactly what you are getting? Choose incorrectly and your budget takes another hit to upgrade to the "better" version.

Make sure you understand how the vendors structure their pricing. Are they offering concurrent licenses or named users? Are licenses purchased in bundles or offered individually? Are there price breaks for quantity purchases and if so, what levels are offered?

In addition, always ask for a money-back guarantee. If what you install is different than what you thought you purchased, any reputable vendor should either solve the problem or be happy to refund your money.

Understand What a License Buys

The vendor should explain exactly what a license buys. What can a licensed user do and not do? Do you need a license for everyone that needs to use the product? If you purchase 100 licenses, does that mean that only the first 100 people in your organization can access the product before you need to purchase more? Some vendors only license the technical or help desk staff and allow unlimited usage by others. Make sure the vendor explains their licensing clearly so you can fit your needs to their offerings.

Hosted Applications

If you're also evaluating hosted applications, make sure to compare the license models offered. The hosted offerings may be different than software installed on your servers.

Make sure you understand the exact terms of the hosted contract. Are you locked in for a set time frame, such as a year, or can you terminate the agreement at any time? If the agreement is terminated, can you have your data? On many hosted applications, the data is owned by the hosting company and cannot be provided to you in case you decide to end your association. This will leave you with a hole in your support history and you may lose valuable information. It's important to bring this up with the vendor representatives and understand who owns the data.

Also make sure that you're provided information on data security and the downtime statistics from their hosting facility. This gives you a good understanding of their reliability and safety. Find out about maintenance, when it's performed and the type done. Understand the company's backup policies and find out how long it would take to restore your system should data become lost or corrupted.

Customer Support and Training

Support options may generate confusion so have them explained so you understand the terms.

Vendors may offer multiple support options that are based on per incident or per year. They may also offer different service levels to allow you to choose the support level that works for your company. Often the support options are related to the number of licenses purchased and may vary across providers.

Make sure that support is available when you need it, 24 hours a day, 365 days a year.

Support options may also be included a part of a subscription offering. These offerings usually bundle services such as ability to get upgrades and new versions with unlimited support under one price.

No matter what provider and support option you choose, the quality of the support service is very important. If the company has a bad reputation for service, then very likely you won't be happy with their products. You want a product that accomplishes your goals with both a support and service staff that provides outstanding service to you, should you need it. The best way to find this out is to ask for references and support survey results. A company with good support will be happy to provide the information and may offer it as part of their sales pitch. You may also see if a user forum exists so you can read comments from their customers and get an idea of what type of service you will receive once the purchase is made.

Training is an important part of the implementation of any good software product. Have the vendor give you a list of available training options. Make sure you understand the cost involved. Some companies now offer video training options. See if you can preview them ahead of time to gain understanding of the quality of the videos as well as gauge the company's teaching techniques.

If possible, consider onsite training offered by most companies. This would be a good option for you to get more detailed training and configuration assistance.

Another consideration is the availability of training or support assistance if you decide to run an evaluation copy of the software. Support and training at this point gives you an insight on what to expect after you make your purchase.

Product Development, Releases and Packaging

Discuss the release history with the vendor to get an idea of how quickly they add new features and improvements to their software. A consistent release history can mean the vendor is improving their product and will provide value to maintaining subscription and support contracts. Get a copy of the vendor's road map for future releases and see the approximate time. This is important information to have as you consider a new help desk package.

Ask the vendor if new releases are included in your support or subscription contract. Releases that are not included in your support or subscription contract may incur large costs to you in the future.

You also need to understand how the software is packaged. Some products are all in one, so you cannot pick and choose which features are enabled in the software. This can provide major confusion if you do not need all of the capabilities. Some packages are purchased as a core system and additional modules. In this case you pay for the base product that provides all the basic features, but may not include major functionality such as email conversion, LDAP integration, or asset management capabilities. This type of packaging provides you with the benefit of picking and choosing what features to invest your dollars in. Also make sure that any module you purchase is fully integrated with the software.

Expandability and Scalability

Today's company of 50 employees can very easily be tomorrow's company of thousands. Any package purchased today needs to be flexible enough to handle any growth your company may have in the near future. Expansion can affect your decision in several ways.

Users – As your company grows it expands its user base and as a result your support staff grows to continue to provide assistance. This requires that any software package purchased must have a flexible way to expand licensed users.

Scalability – The package purchased today must be able to handle the work load of the future. While you may only currently be handling 50 tickets a day, your software must be able to handle more than just that minimum without needing to upgrade or change settings and yet still provide reliable service to your users.

More Than Just Help Desk – Some packages are geared only for Help Desk while others are designed to allow more flexibility. A package that delivers the flexibility to handle other types of issues, such as Facilities or Customer Support, within one software package provides lower overhead and cost savings over the long run.

Vendor Reputation

Do your homework on the vendor you are selecting. The vendor reputation, customer base, and financial stability are all key factors in your decision to buy software. Ask yourself:

- Does the company have a solid financial base? Can they prove it to you?
- Are they for sale or have they been recently acquired? If they are for sale, why?
- Can they provide customer satisfaction scores on support or training?
- Can they provide references?
- Are there other customers using the product in your industry?
- What awards or recognition have they received?
- Who are the vendor's customers?

Other Considerations

Sarbanes-Oxley or HIPAA

If Sarbanes-Oxley or HIPAA affect your industry, then it will probably affect your solution selection as well. You need to understand how your solution addresses these requirements.

Source Code

Is source code availability a factor? It provides significant protection should the vendor go bankrupt, and gives you the ability to modify the solution to your exact requirements. Look for a vendor that offers source code for free and has extensive experience assisting customers in doing their own unique modifications while continuing to let the customer stay on the solution upgrade path.

ITIL

The Information Technology Infrastructure Library provides a detailed list of recommended processes and procedures to operate a Help Desk. Any package you purchase should provide you with the capabilities to implement some of the recommended practices of ITIL. While some find that ITIL Certification is a must for any package purchase, others do not. What we would suggest is to find a package that meets your company's needs and desired level of ITIL implementation.

Important Software Features

Configurable Email Notification

Email is an important part of the notification process in any Help Desk solution. Make sure the email settings are configurable so you control when email is sent. You should also be able to control the content of the email, so you can tailor the message for your company.

Customizable System Options

Look for packages that offer customization settings within the interface itself. This usually means the package is easier to configure. Some packages are very complex and need the assistance of vendor personnel to install and configure the software for you. This can add expense to the product, but may be worthwhile to correctly configure and use the product you've selected.

User Management

Managing users is an important feature of any package. The availability of a large and diverse set of user permissions and abilities allows a lot of flexibility in how the users can work in the software. Some packages use groups to control permissions, allowing access control for many users at one time. Another important feature to look for is whether you can upload users directly into the database, saving you valuable time. One such mechanism to do that is through integration with your existing Active Directory. Some products even offer the ability to connect to multiple domains, which may be important to your organization.

Reporting

The ability to report on the data entered into the Help Desk site is just as important as the features that capture the data. A Help Desk product should offer you a full range of pre-formatted reports as well as the ability to create your own reports, giving you the flexibility to provide powerful information to your management. Some products will offer the ability to schedule these reports to be delivered automatically, saving time and effort.

Change Management/Process Management

You might need to manage system changes within your organization. If so, make sure your solution of choice can help you to track your processes, as well as capture required documentation, notify users and request approval from the appropriate personnel.

Additionally, you may want a solution that can assist in documenting processes so that you can define your process steps, determine who should handle them as well as guarantee that an identical process is completed from start to finish.

As with any business decision, doing your homework now pays dividends in the future. This document is provided to help you with that homework in the hope that your decision leads you to more productive and profitable operations in the future. We also hope that this document introduces Issuetrak as a vendor to consider when making your Help Desk software solution decision. If you find this document helpful then you will find Issuetrak's staff and software just as helpful!